

Hi, we're Octopus MoneyCoach!



Personalised, impactful,
and **measurable**
financial wellbeing



**Feel the power of
talking about
money**



**Why personalised
approaches to
financial wellbeing
work**

**Have you ever worried
about money?**

Money is now
the **#1 cause of stress**
and poor mental health
for employees

94%

of all employees worry
about money

We know talking about money helps employees feel **4x more positive**

“It is making me **really think** about my future finances.”

“After just 2 calls I feel so much better...such **peace of mind.**”

“Great sessions that are **very specific** to my needs.”

“It has **motivated us** to do things we should have done years ago.”

“I don't feel judged and feel **empowered** to start making the right changes.”

And as employers, you feel the difference too!

“I’ve been impressed and even taken aback at the **quality of conversation** with my coach”

Head of Reward
Browne Jacobson

“Whether you’re a trainee or further in your career, **the coaching is tailored to you**. People earning less are getting just as much from it as those with higher earnings”

CEO
SR2

“People are talking about how it’s **such an easy experience** – which is really important, because if these things are difficult, then you shy away from it”

CEO
Blick Rothenberg

**Your chance to talk
money with a coach!**

Meet Caspian, Don and Ali!



**“We can’t make any assumptions
that anybody already has healthy
money habits in place.”**



Adam Fox-Everitt
Head of Reward
Browne Jacobson

My story...

15+ years employed

9+ years in financial services

Single, no dependents

Female

- ✓ Pension & Protection
- ✓ EAP
- ✓ Webinars
- ✓ Wellbeing Hub

What you don't see...

- ✓ Fully remote worker



What you don't see...

- ✓ Fully remote worker
- ✓ Part-time carer



What you don't see...

- ✓ Fully remote worker
- ✓ Part-time carer
- ✓ My attitude to money



To make a real impact, we have to speak to individual needs and concerns



“How do I get on the property ladder faster?”

“How do I build a monthly budget I can stick to?”



“How can I best save for my daughter’s education?”

“What’s the best way to start saving?”



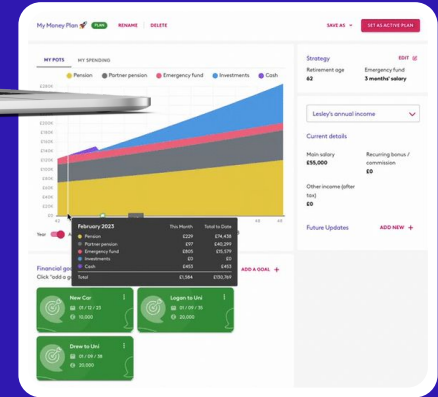
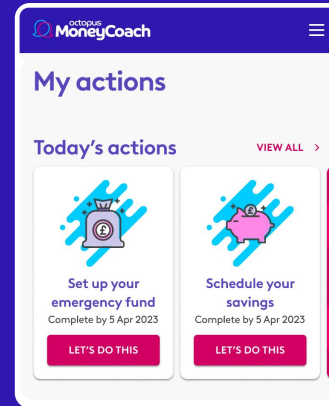
Personalised 1-to-1 Guidance

Dedicated Coach or Planner

Discuss Worries and Goals

Personal Forecast

Measurable Action Plan



Welcome to the third wave of financial wellbeing

First

Financial Benefits

Pensions

Savings Schemes

Workplace Loans



Then

Financial Education

Content

Webinars

Reactive support



Now

1-to-1 Guidance

“The third wave of financial wellbeing”

- ✓ More personalised
- ✓ More measurable
- ✓ More impactful



Pension auto enrollment introduced



Workplace “financial education” awards go mainstream

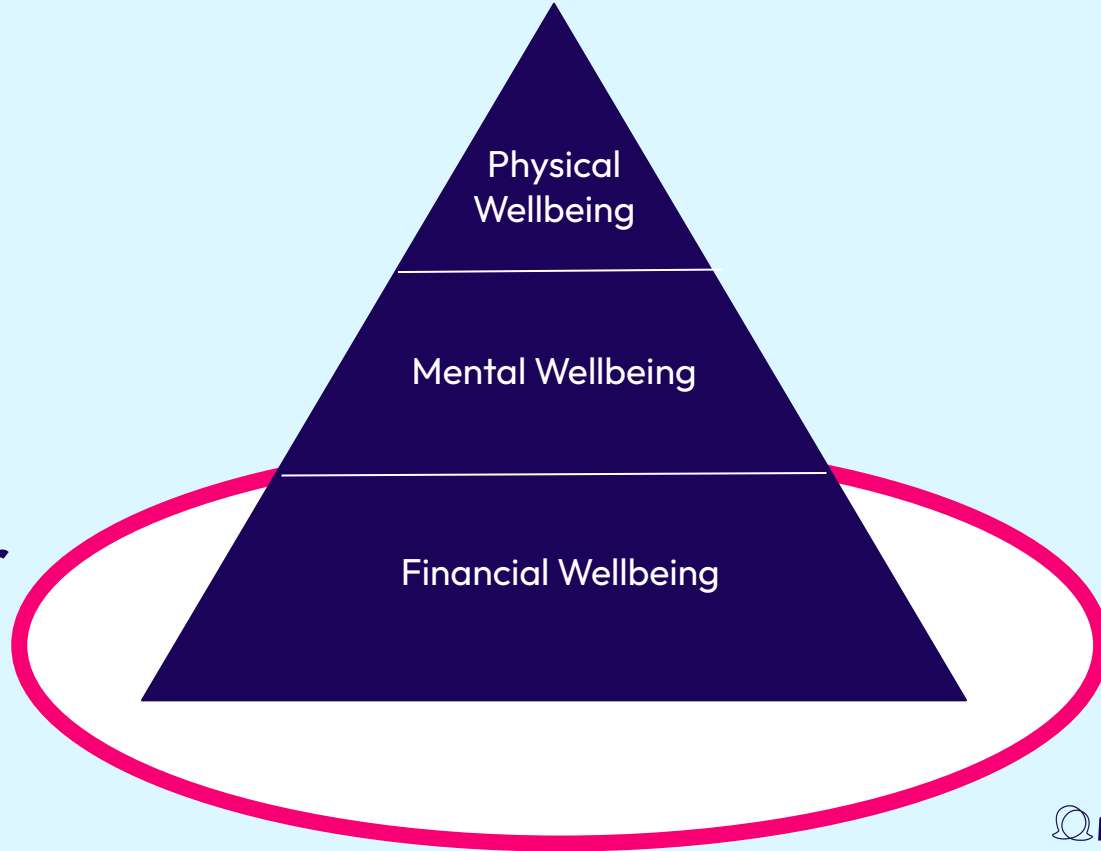


Money coaching is the #1 most wanted benefit (PWC, US)

Financial wellbeing
is still seen as up
here... in the
nice to haves



**But for
employees
financial
wellbeing is their
core ask**



The Five Must-Haves!

✓ Fully personalised

The Five Must-Haves!

- ✓ Fully personalised
- ✓ Builds knowledge

The Five Must-Haves!

- ✓ Fully personalised
- ✓ Builds knowledge
- ✓ Creates accountability

The Five Must-Haves!

- ✓ Fully personalised
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- ✓ Accessible to all

The Five Must-Haves!

- ✓ Fully personalised
- ✓ Builds knowledge
- ✓ Creates accountability
- ✓ Accessible to all
- ✓ Always inspirational!

Let's talk money!



Find our team and
let's chat about
money!

